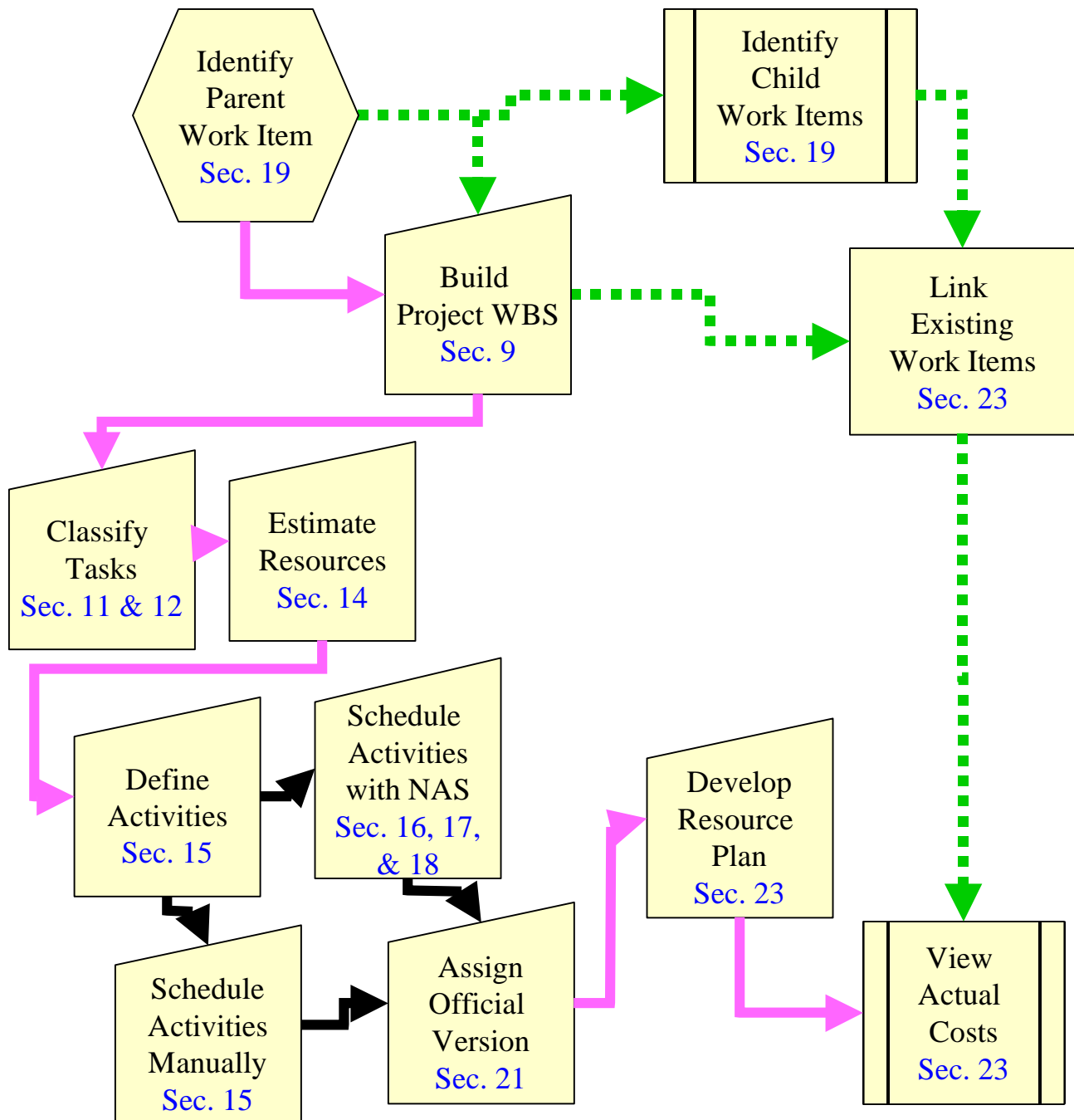


Linking PROMIS and CEFMS

Flow of Activities



Linking PROMIS and CEFMS



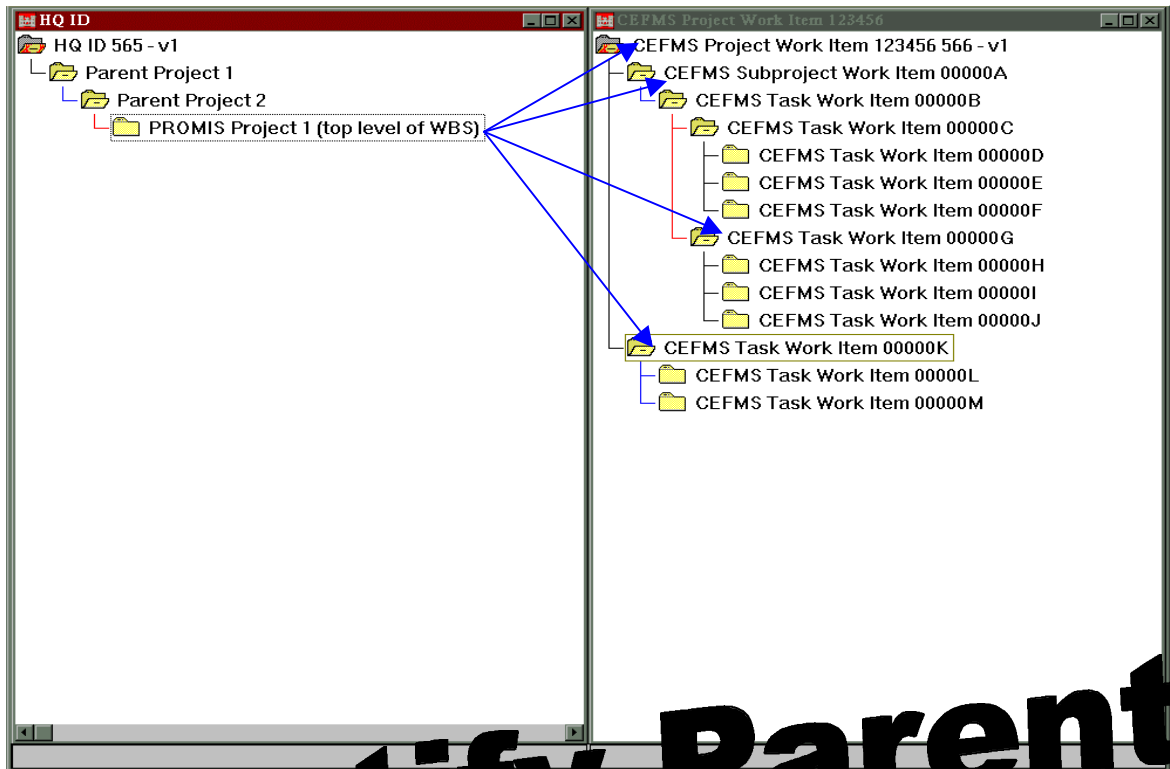
PROCESS ONE

Linking Existing

Work Items



Linking PROMIS and CEFMS

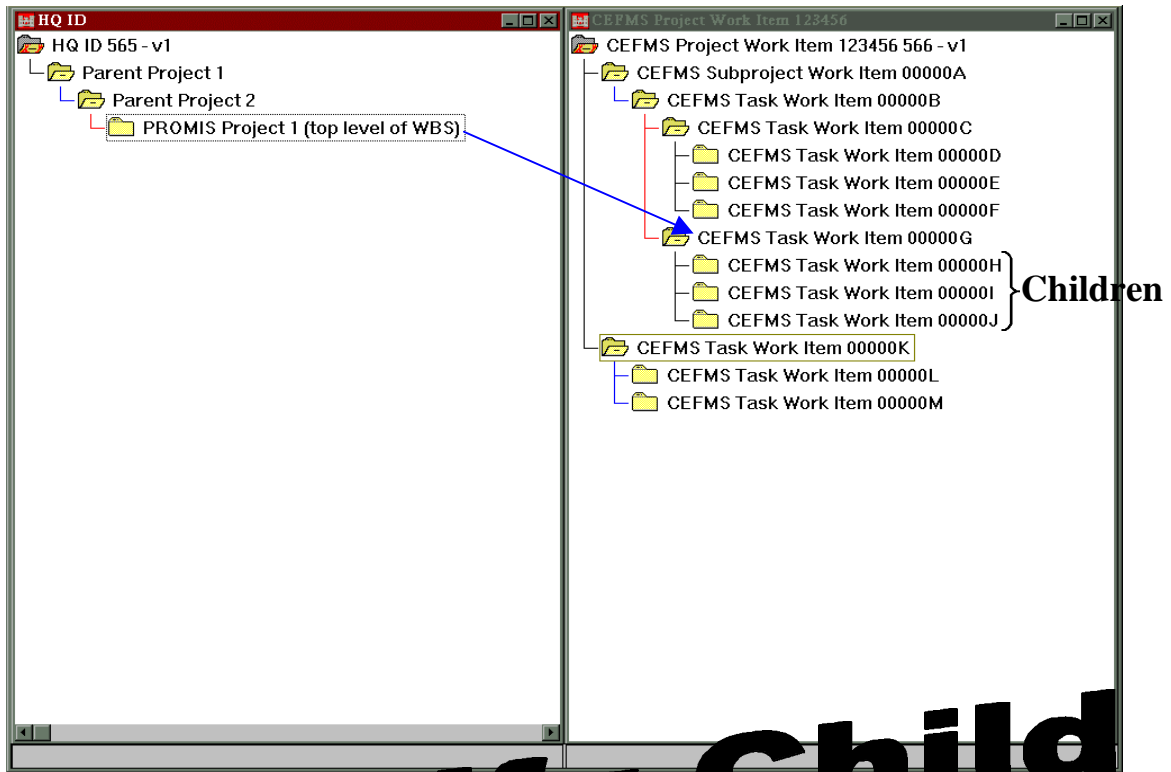


Identify Parent



In the PROMIS System Administrator Utility, the SA will register the project and identify the CEFMS work item that is associated with the PROMIS project. This work item may be a project, subproject, or task work item type in CEFMS. However, it must be the parent work item to all other CEFMS work items that you wish to associate with your project. If your project has already been registered, the SA may modify that data to include the parent CEFMS work item. [[“Your Ticket to PROMIS”, Section 19](#)]

Linking PROMIS and CEFMS

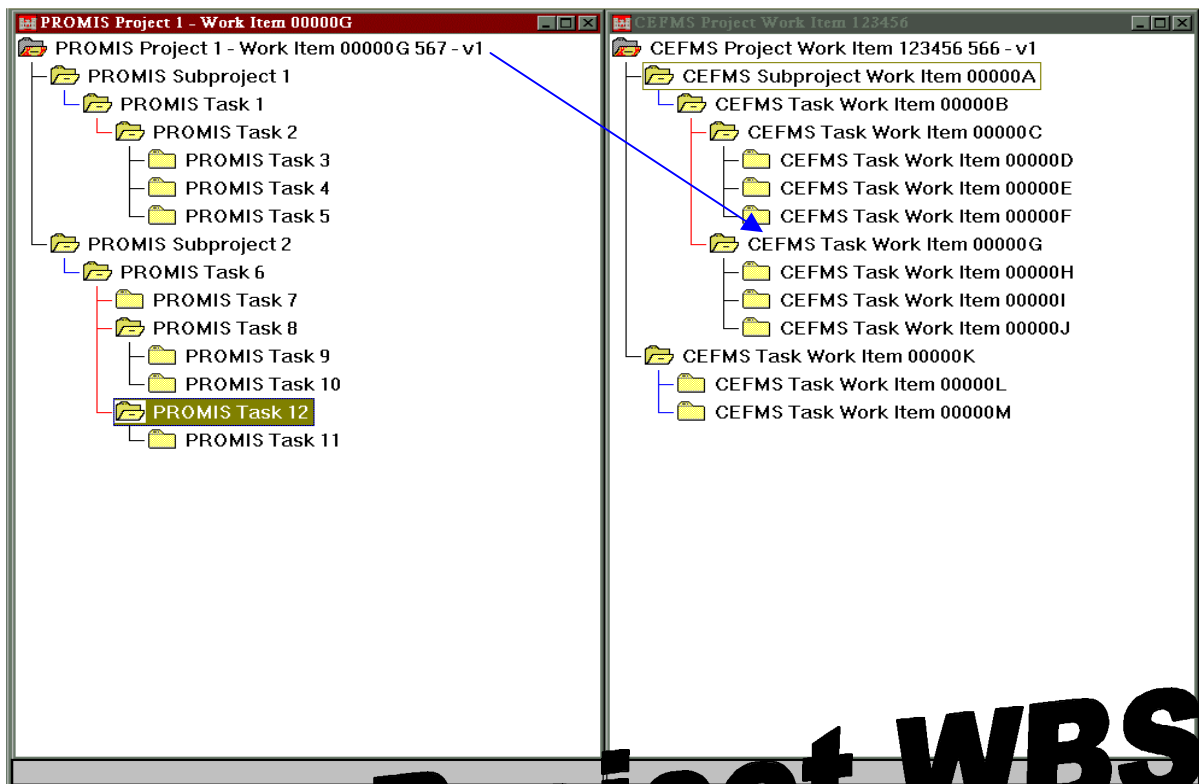


Identify Child



After the Parent Work Item has been associated with the project, PROMIS will access the CEFMS database and identify all existing children of that parent. *This is done automatically and does not require any additional interaction by the SA or the user.* These children will be available for linking to PROMIS tasks. For example, if the PROMIS Project is linked to CEFMS Task Work Item 00000G, the children of that work item (00000H, 00000I, and 00000J) will be available for linking to PROMIS tasks. You must build the project WBS before linking existing work items.

Linking PROMIS and CEFMS

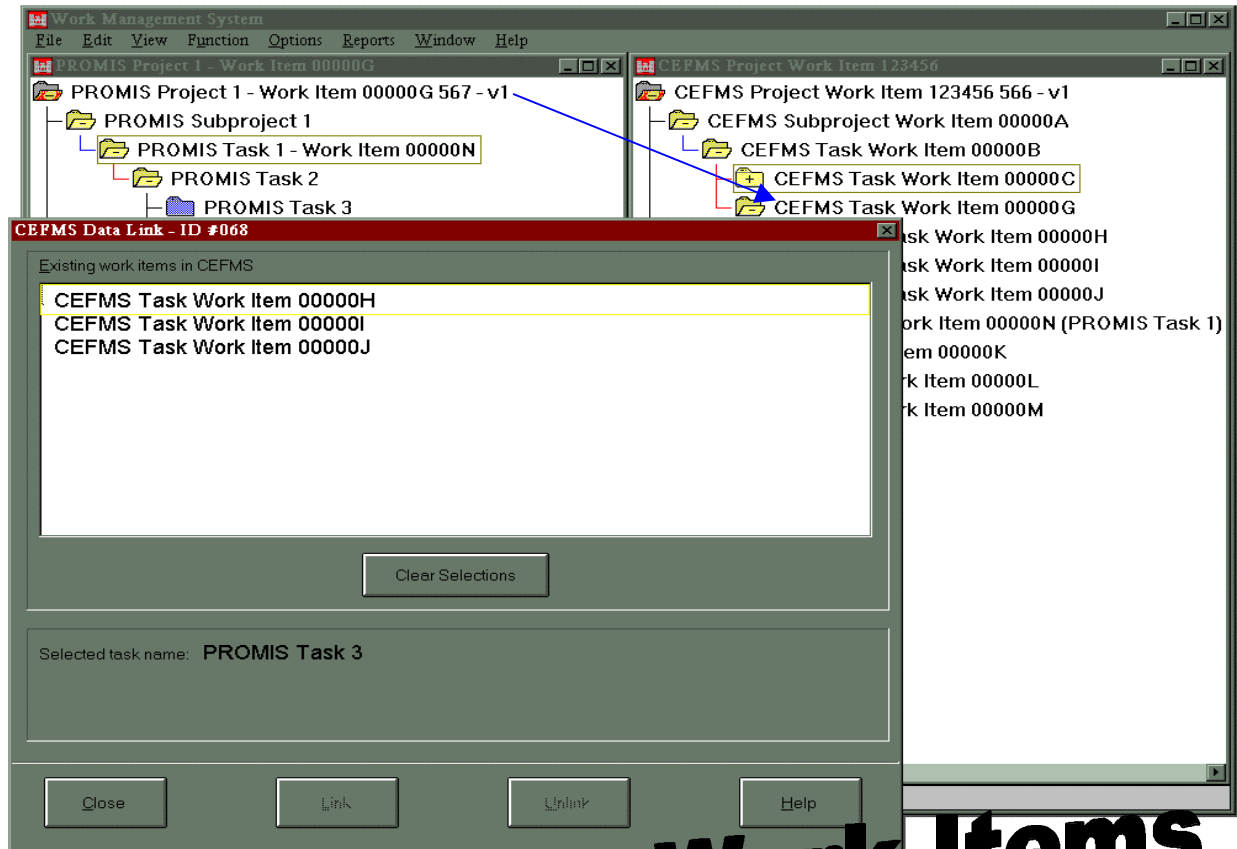


Build Project WBS



In the PROMIS software, the Project Manager will build the project-specific Work Breakdown Structure (WBS) which defines the scope of the project (the list of products that must be accomplished to complete the work). This WBS can be built from the HQ Standard Template for that project type, a customized template, or another project of the same type. [[“Your Ticket to PROMIS”, Section 9](#)]

Linking PROMIS and CEFMS

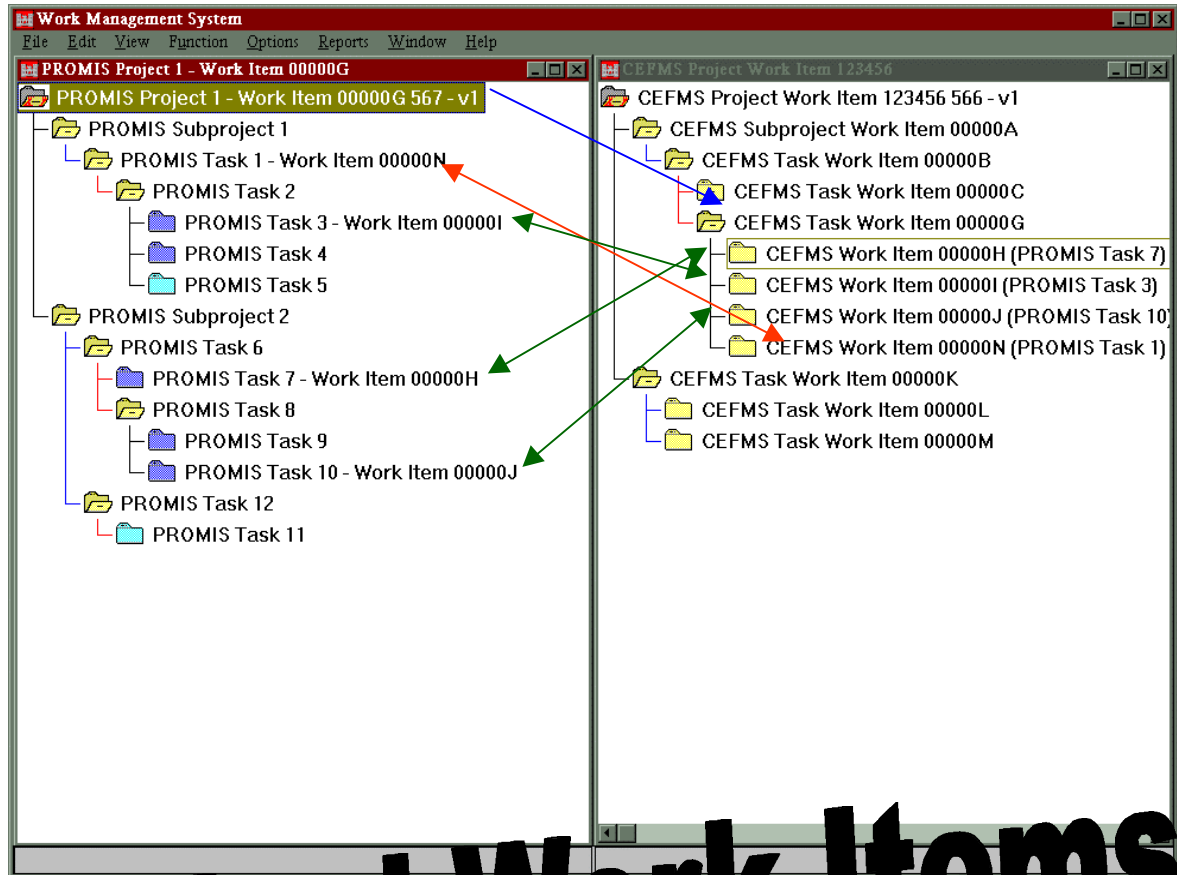


Link Existing Work Items



If there are existing work items in CEFMS that are children of the parent work item associated with the PROMIS Project, these work items are available for linking to tasks within that project. To access the CEFMS Data Link dialog, select the Function menu, Financial command, Initial Data Link subcommand. Highlight the CEFMS Work Item, select the PROMIS task in the project WBS, and hit the Link button. Remember you must build the project WBS before attempting to link existing CEFMS work items. [[“Your Ticket to PROMIS”, Section 23](#)]

Linking PROMIS and CEFMS



Linked Work Items



When the existing work items are linked to PROMIS tasks, it is not necessary that you maintain the PROMIS hierarchy within CEFMS or vice versa. If you want to do so, you must modify the work item parentage from within CEFMS. [[“Your Ticket to PROMIS”, Section 23](#)]

Linking PROMIS and CEFMS

The screenshot shows the 'Work Management System' interface. A tree view on the left lists project items: PROMIS Project 1 - Work Item 00000G 567, PROMIS Subproject 1, PROMIS Task 1 - Work Item 00000N, PROMIS Task 2, PROMIS Task 3 - Work Item, and PROMIS Task 4. A 'Task Identification - ID #038' dialog box is open, showing 'Name: PROMIS Task 3 - Work Item 00000I' and 'Template Item: A0000-Reconnoi'. Below this, the 'Display Actuals - ID #089' dialog box is open, displaying task data and a table of actual cost data.

Task data

Name: PROMIS Task 3 - Work Item 00000I
Start date: N/A Finish date: N/A

Actual cost data

Organization	Estimated Cost	Commitments	Obligations	Expenditures
CESWF-PM-M	109879.25	0.00	0.00	0.00
Total	109879.25	0.00	0.00	0.00

Buttons: Close, Help

View Actual Costs



Actual costs can be viewed from the Actual Cost button on the Task Identification dialog or from the Function Menu, Financial command, Actual Cost subcommand. Since PROMIS data is updated from CEFMS daily, you should wait until the next morning before attempting to view the data in the other system. If you need the data immediately, call the PROMIS hotline (1-800-LAB-6WES ext 3562) to request an immediate update. [[“Your Ticket to PROMIS”, Section 23](#)]

Linking PROMIS and CEFMS

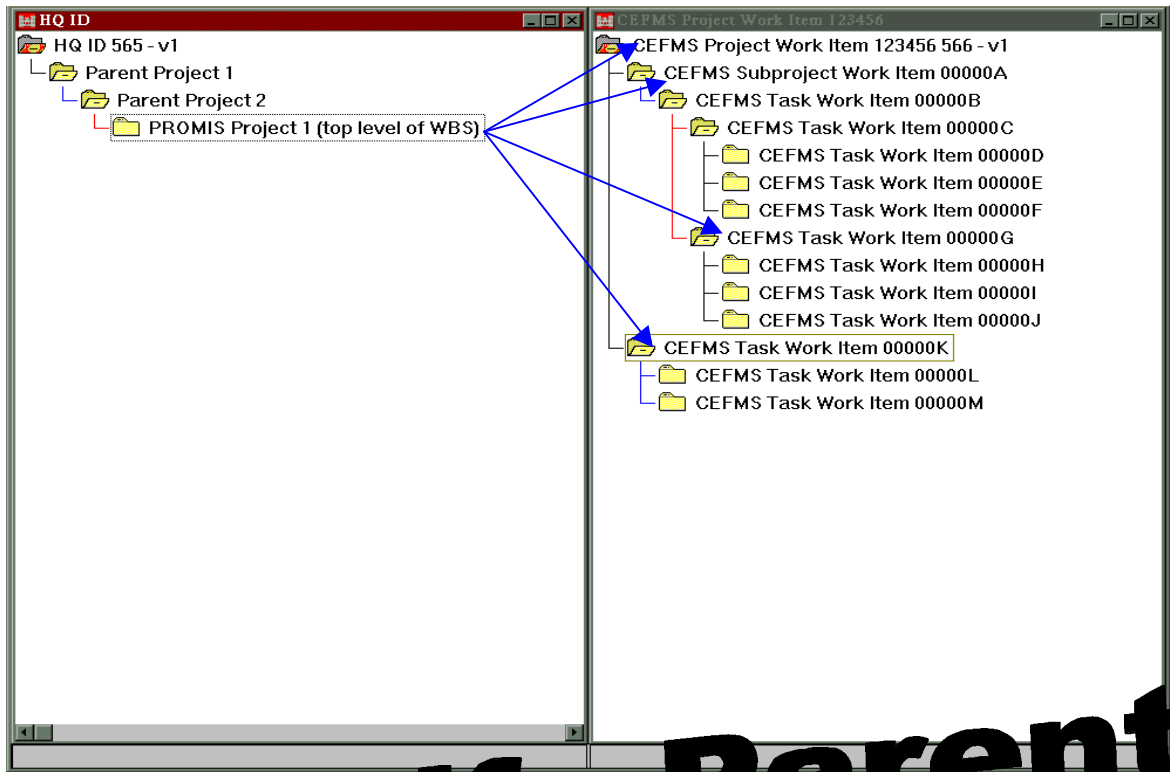


PROCESS TWO

**Create New
Work Items**



Linking PROMIS and CEFMS

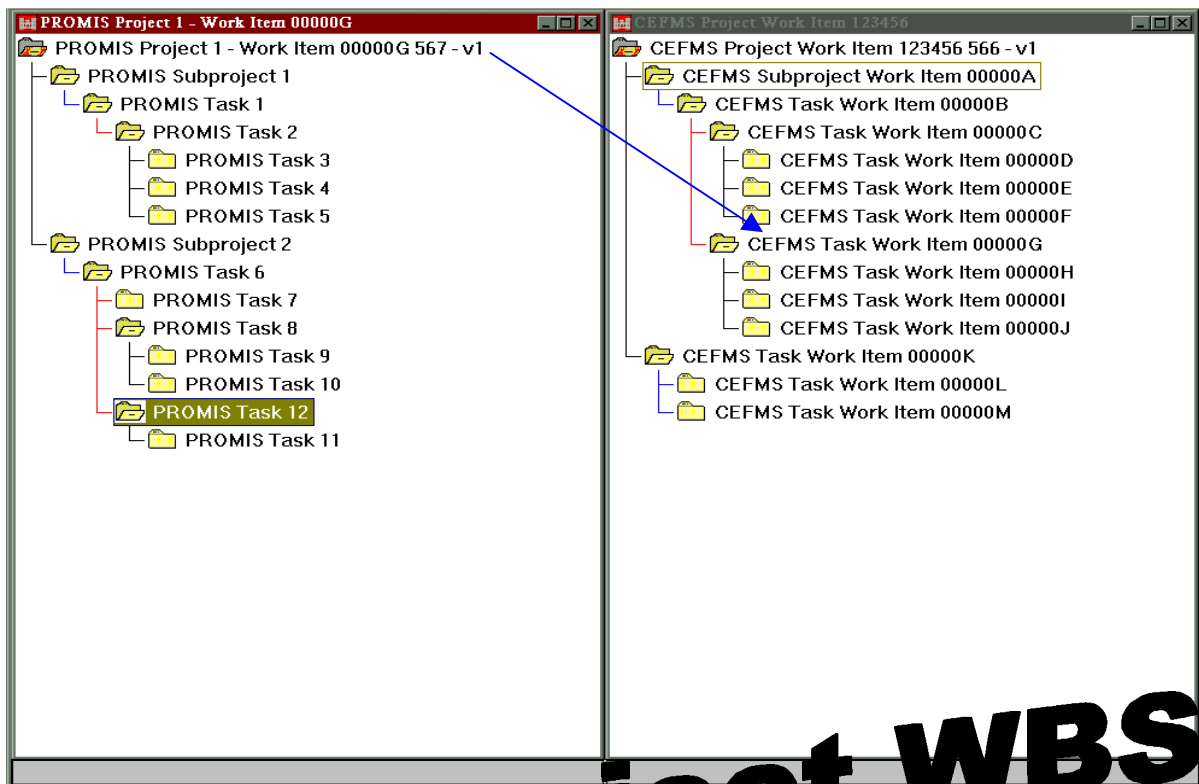


Identify Parent



In the PROMIS System Administrator Utility, the SA will register the project and identify the CEFMS work item that is associated with the PROMIS project. This work item may be a project, subproject, or task work item type in CEFMS. However, it must be the parent work item to all other CEFMS work items that you wish to associate with your project. If your project has already been registered, the SA may modify that data to include the parent CEFMS work item. [[“Your Ticket to PROMIS”, Section 19](#)]

Linking PROMIS and CEFMS

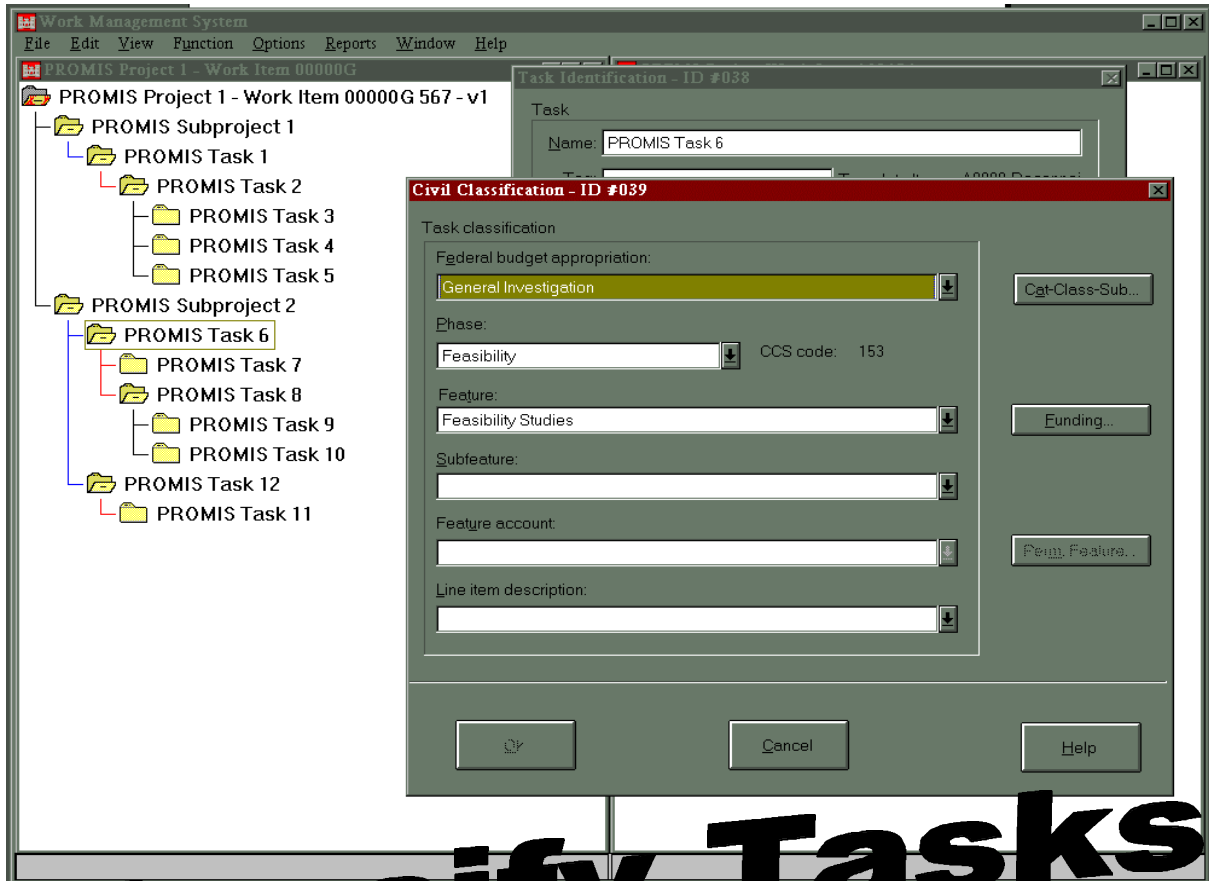


Build Project WBS



In the PROMIS software, the Project Manager will build the project-specific Work Breakdown Structure (WBS) which defines the scope of the project (the list of products that must be accomplished to complete the work). This WBS can be built from the HQ Standard Template for that project type, a customized template, or another project of the same type. [[“Your Ticket to PROMIS”, Section 9](#)]

Linking PROMIS and CEFMS



Classify Tasks



The Project Manager will assign a Responsible Employee to each WBS item (subproject or task). The Project Manager or the Responsible Employee will classify the tasks. Remember:

1. Classification data is inherited by the task's children.
2. The task must be classified before you can estimate the resource requirements.
3. The Responsible Employee can only enter data for the tasks to which he/she is assigned.
4. No classification is required for HTRW projects.

[\["Your Ticket to PROMIS", Sections 11 and 12\]](#)

Linking PROMIS and CEFMS

Resource Estimate - ID #061

Task name: PROMIS Task 4

Estimate

Organization: PM-M Military Branch Units: Lump Sum Qty: 1

Resource type: AE Services

Employee: Rate: \$25,000.00 Contingency: 5.0%

Method of accomp.: Contract - Outside Government Override: ☒ Tech indir. ☒ Overhead

Add Modify Delete

Organization	Direct	Tech. Indir.	Overhead	Contingency	Total
PM-M	21065.00	18200.16	10679.96	4994.51	54939.63
PM-M	25000.00	0.00	0.00	1250.00	26250.00

Total 81,189.63

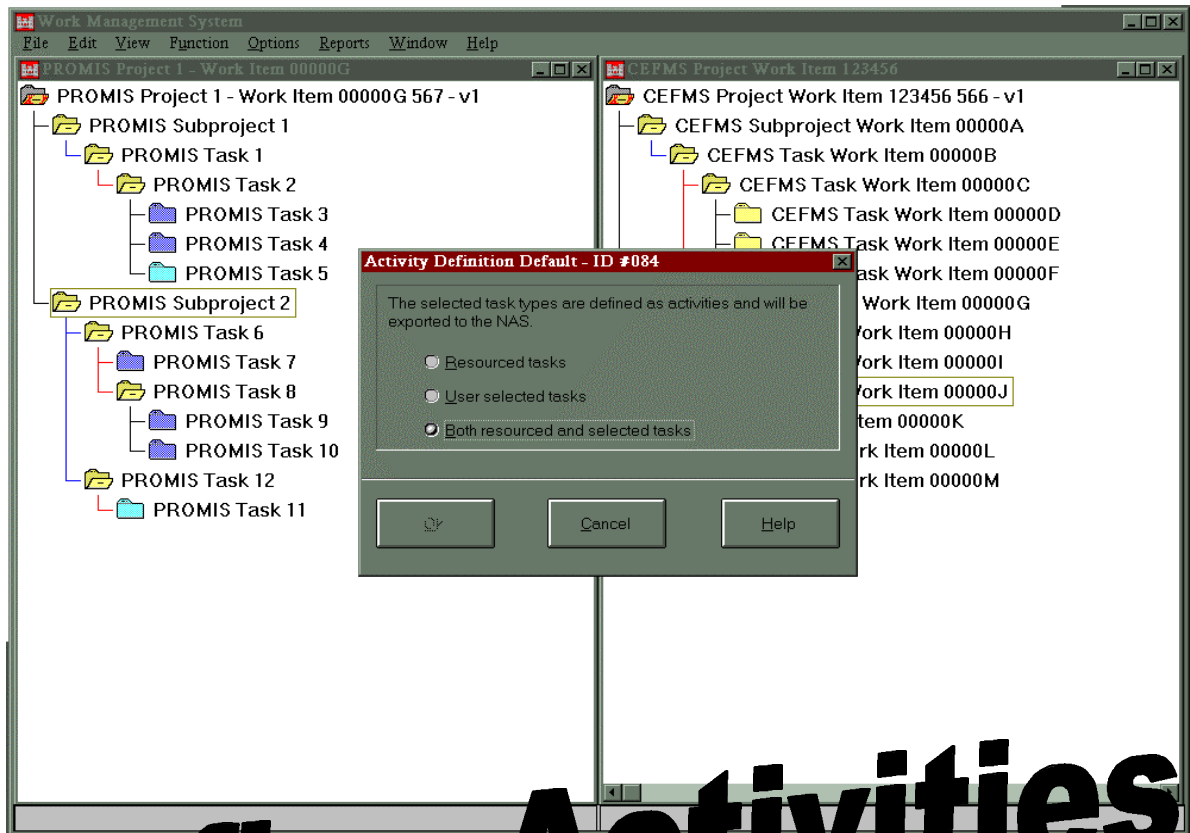
Vendor... Comment... Clear Close Help

Estimate Resources



The Project Manager or the Responsible Employee for the selected task must enter the resources estimated to be required to execute the task. Valid values for resource type, units of measure, method of accomplishment, and rates (both effective and average organizational) are shared with CEFMS. [[“Your Ticket to PROMIS”, Section 14](#)]

Linking PROMIS and CEFMS

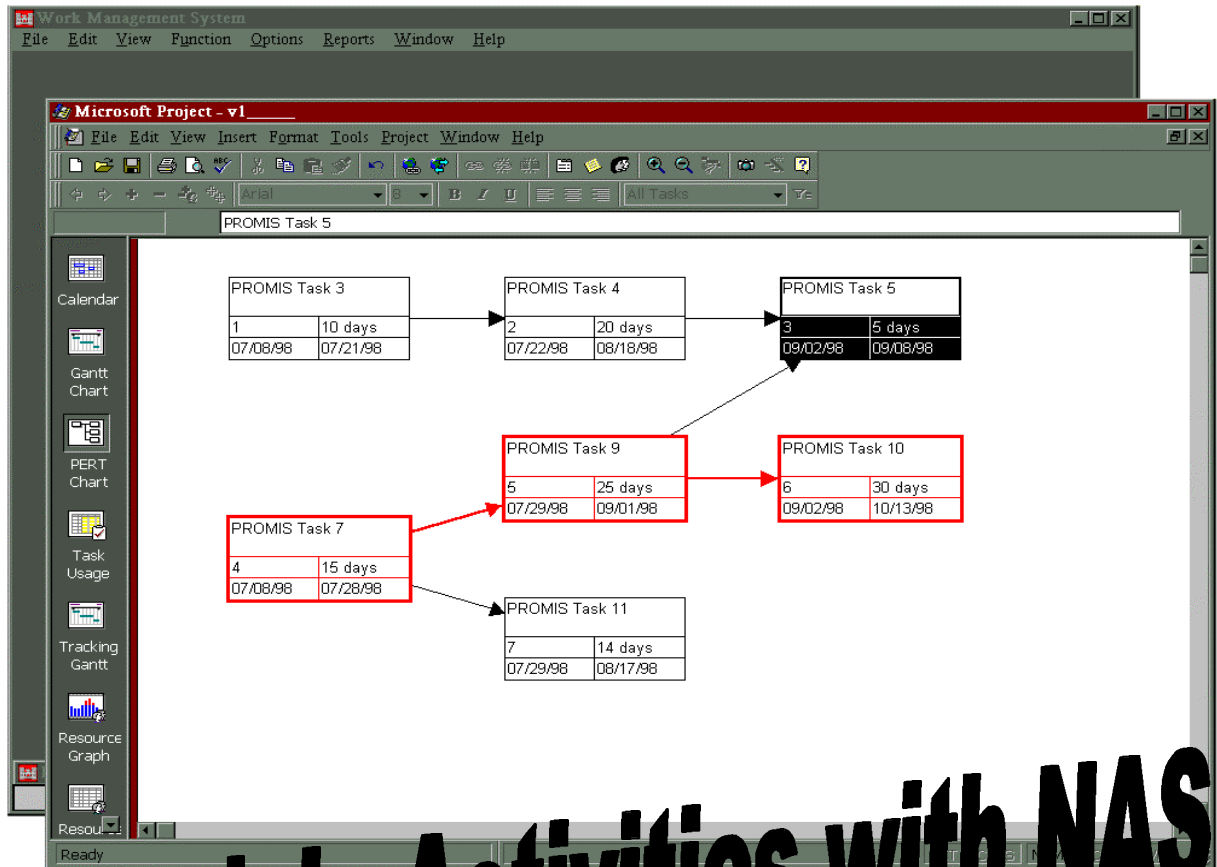


Define Activities



The Project Manager or the Version Owner must define those tasks which are schedule activities. Schedule activities may be resourced tasks (dark blue folders), user-selected tasks (light blue folders), or both. To define activities, select the Options Menu, Defaults command, and Activity Definition subcommand. Remember that selection of this default applies to the entire version and not just to selected tasks or branches. [[“Your Ticket to PROMIS”, Section 15](#)]

Linking PROMIS and CEFMS

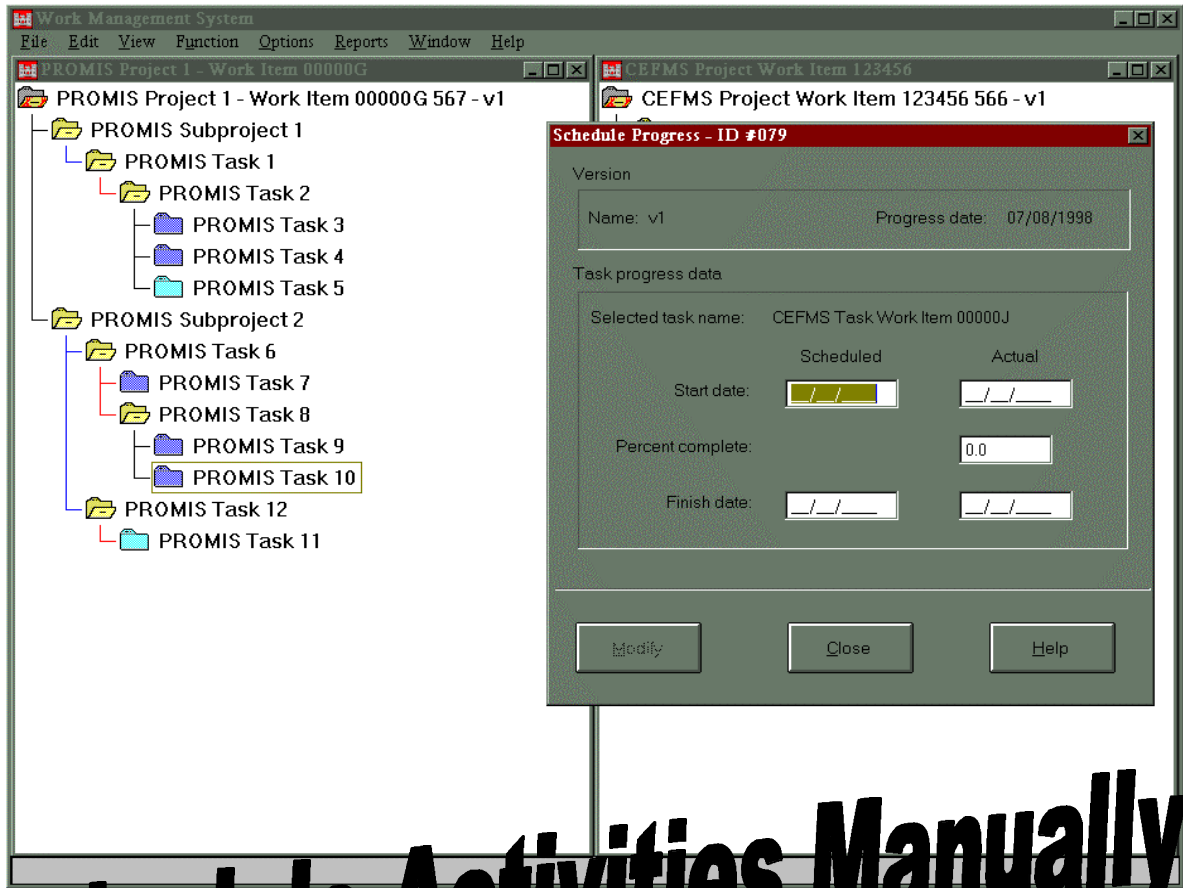


Schedule Activities with NAS



You can define the path to your NAS executable using the Options menu, Configure NAS command. Access your NAS package using the Function menu, Schedule command. In the NAS, enter the duration and predecessor of each activity. (For instructions specific to your NAS, refer to the appropriate section of the manual). Note: If your NAS is not one of the 3 cited here, you should generally follow the instructions in Section 16. [[“Your Ticket to PROMIS”](#), [Sections 16, 17 & 18](#)]

Linking PROMIS and CEFMS

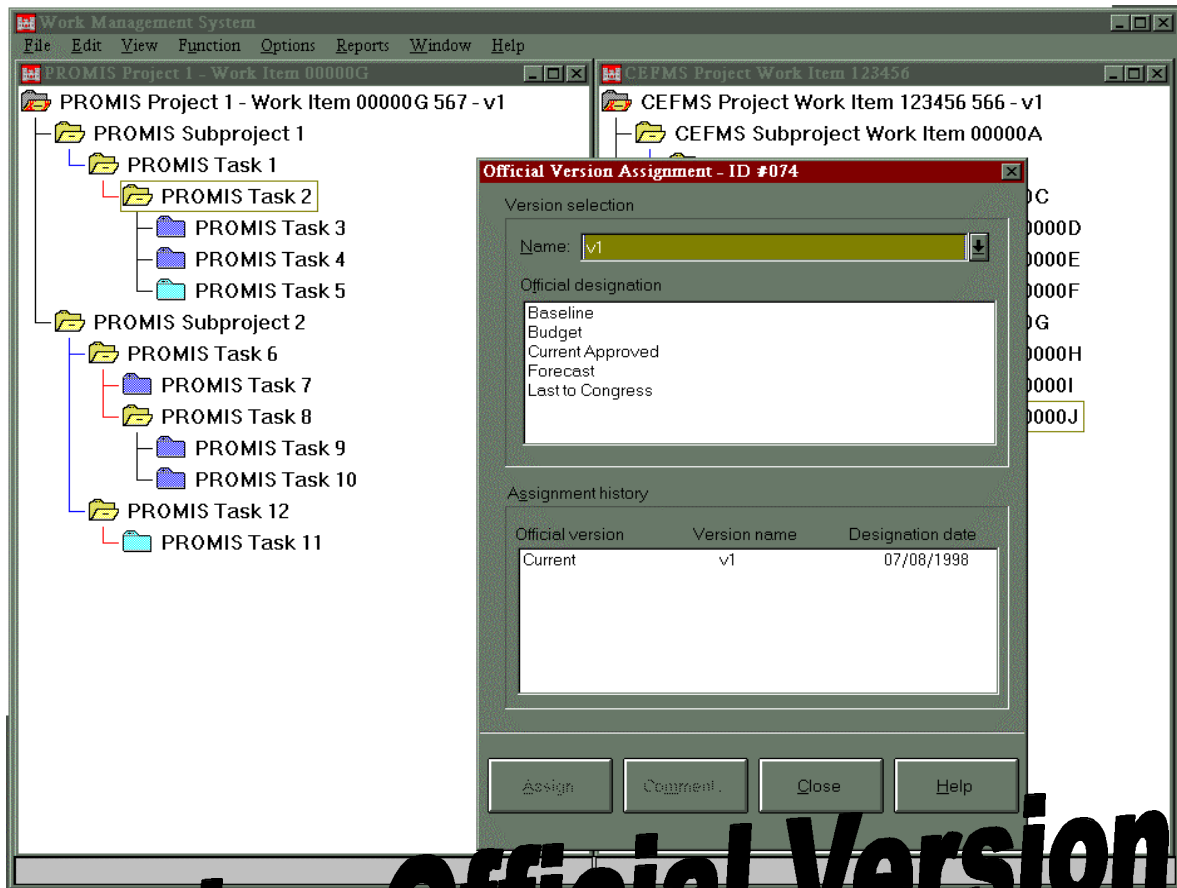


Schedule Activities Manually



If you only have a few activities associated with your project and don't want to use a NAS package for scheduling, you can manually enter schedule data in the Schedule Progress dialog. This dialog is called by the Function menu, Progress command. The command is only enabled if your project version has never been scheduled in a NAS package. [[Your Ticket to PROMIS, Section 15](#)]

Linking PROMIS and CEFMS

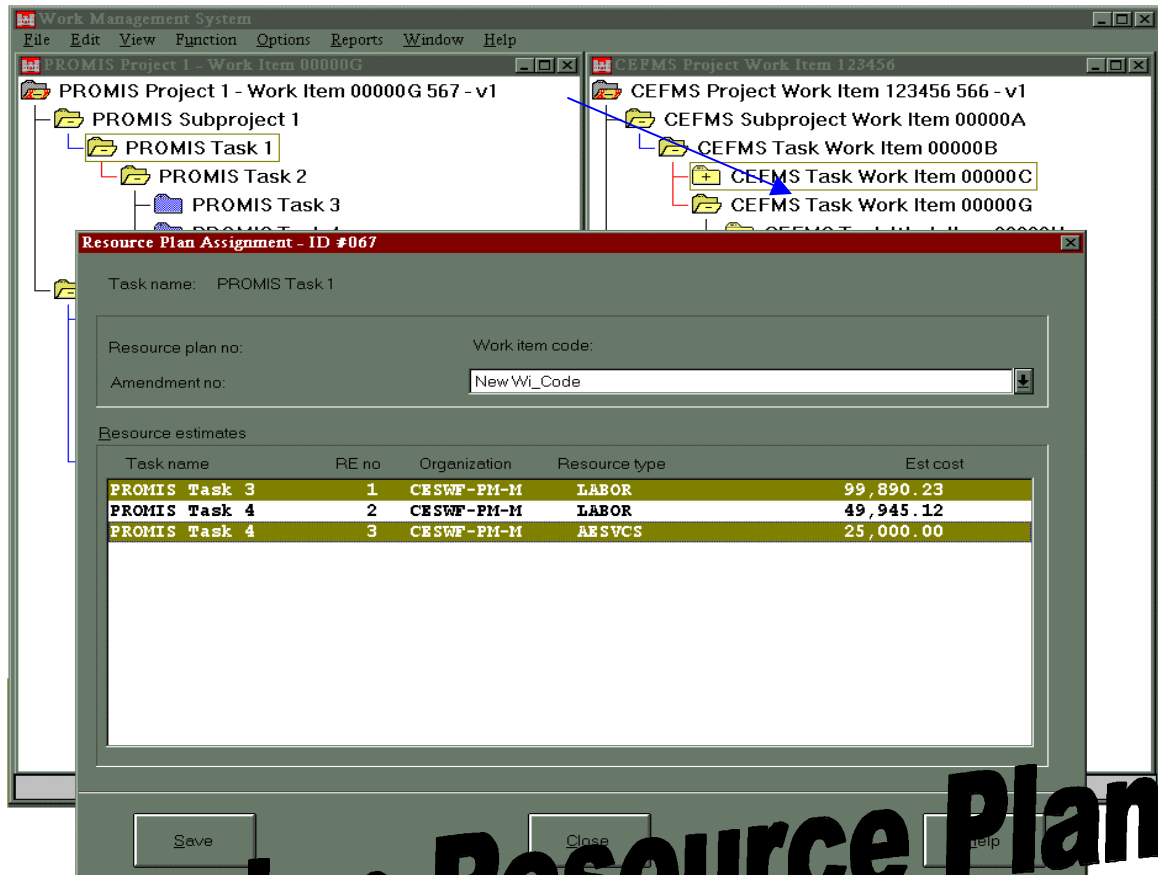


Assign Official Version



PROMIS exchanges data with CEFMS from the Current Official Version. Thus, prior to defining a resource plan, you must designate your version as the Current Official Version (Function menu, Change Management command, Assign Version subcommand). Keep in mind that only the Project Manager can assign a version as an Official Version. Once a version is assigned as an Official Version, it is owned by the Project Manager, write access is limited to the Project Manager, and read access is open to all PROMIS users within your database. [[“Your Ticket to PROMIS”, Section 21](#)]

Linking PROMIS and CEFMS



Develop Resource Plan

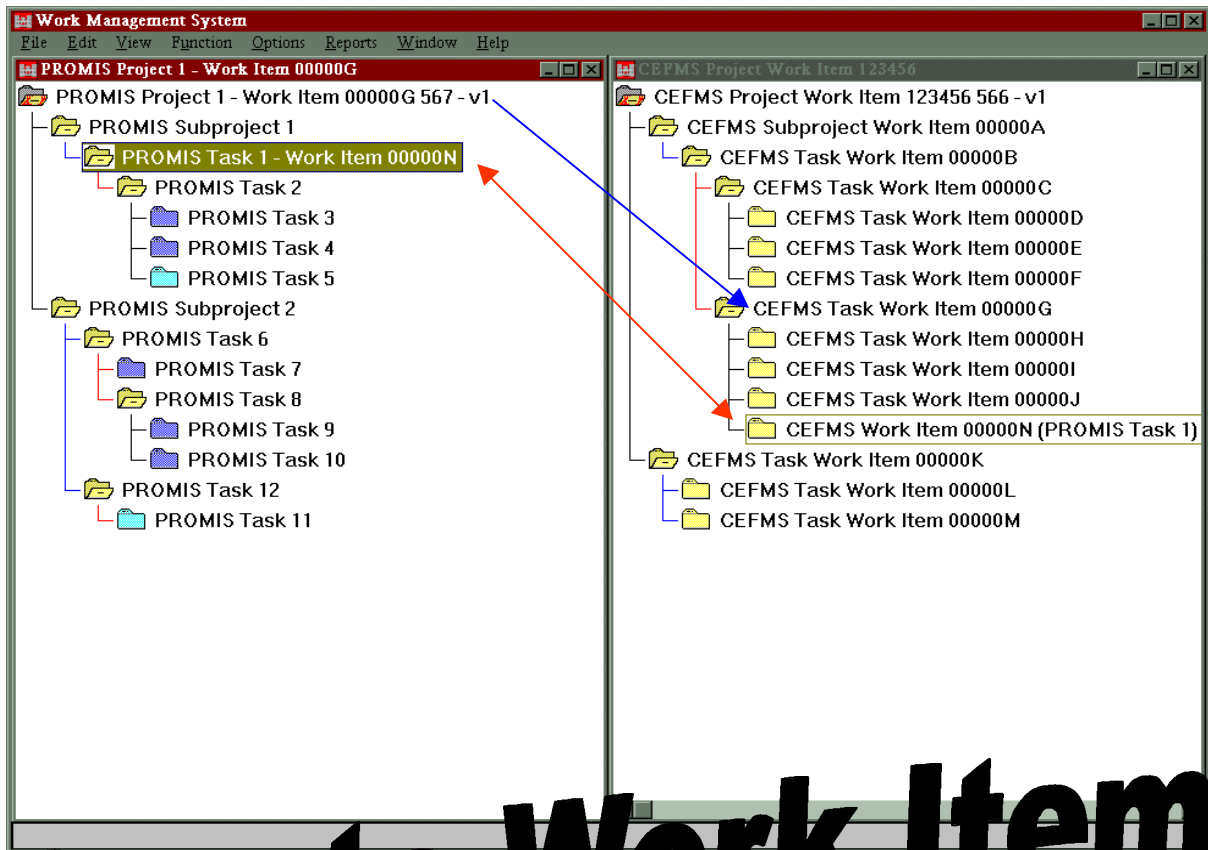


Select the Function menu, Financial command, Resource Plan subcommand to develop your resource plan. To execute this command, you must:

1. Be working in the Current Official Version
2. Be the Project Manager, and
3. Have schedule data

Select the task at which you want to create a work item and resource plan, select either "New WI_Code" or an existing work item code from the drop down list, and the resource estimates you want to include in the current amendment of the resource plan. [[Your Ticket to PROMIS](#), Section 23]

Linking PROMIS and CEFMS



Create Work Item



After you save your resource plan, PROMIS will create the work item and resource plan in CEFMS. The new work item will typically be created as the child of the parent work item identified for the PROMIS project. The only time this will not be true is if a parent of the PROMIS task has been associated with a CEFMS work item. If so, the new work item will be created as a child of the work item associated with its parent task. Work items can not be created for PROMIS subprojects. [[“Your Ticket to PROMIS”, Section 23](#)]

Linking PROMIS and CEFMS

The screenshot shows the 'Work Management System' interface. A 'Task Identification - ID #038' dialog is open, showing 'Name: PROMIS Task 3 - Work Item 000001' and 'Template Item: A0000-Reconna'. Below this, the 'Display Actuals - ID #089' dialog is open, showing 'Task data' for 'Name: PROMIS Task 3 - Work Item 000001' and 'Actual cost data' table.

Organization	Estimated Cost	Commitments	Obligations	Expenditures
CESWF-PM-M	109879.25	0.00	0.00	0.00
Total	109879.25	0.00	0.00	0.00

View Actual Costs



Actual costs can be viewed from the Actual Cost button on the Task Identification dialog or from the Function Menu, Financial command, Actual Cost subcommand. Since PROMIS data is updated from CEFMS daily, you should wait until the next morning before attempting to view the data in the other system. If you need the data immediately, call the PROMIS hotline (1-800-LAB-6WES ext 3562) to request an immediate update. [[“Your Ticket to PROMIS”, Section 23](#)]